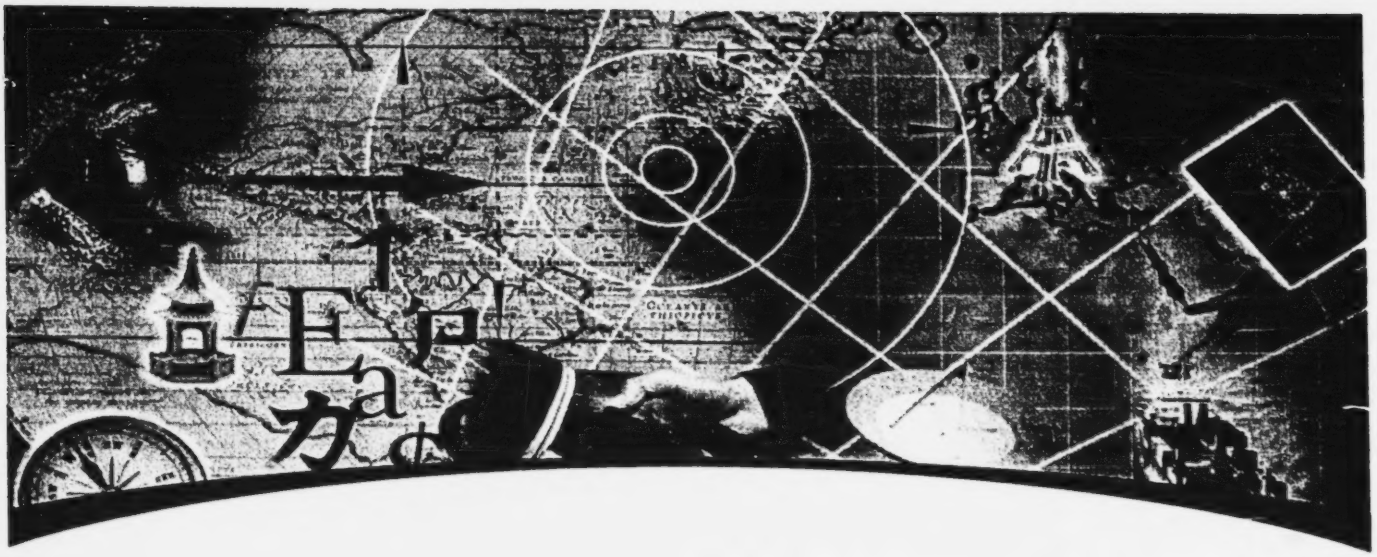

The Organic Products Market in Brazil

June 2002

MARKET RESEARCH CENTRE

Market Reports are available online at:

www.infoexport.gc.ca

Department of Foreign Affairs and International Trade
Ministère des Affaires étrangères et du Commerce international
Canada

The Organic Products Market in Brazil

June 2002

(Également disponible en français sous le titre, Le marché des aliments biologiques au Brésil)

Prepared by the
Market Research Centre
and the
Canadian Trade Commissioner Service

© Department of Foreign Affairs and International Trade
(FaxLink no. 34138)

Canada

103-01278

The Market Research Centre produces a wide range of market reports by region and sector for Canadian exporters. For further information please contact:

Market Support Division (TCM)
Department of Foreign Affairs
and International Trade
E-mail: mrc@dfait-maeci.gc.ca

- DFAIT Internet site (http://www.dfait-maeci.gc.ca)

Trade Evaluation and Analysis Division (TEAD)
Agriculture and Agri-Food Canada
Contact: Jim Lowe
Telephone: (613) 759-7652
Fax: (613) 759-7505
E-mail: lowej@em.agr.ca

Agri-Food Trade Service: (http://ats.agr.ca)

The Government of Canada has prepared this report based on primary and secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information. This report is intended as a concise overview of the market for those interested in its potential and is not intended to provide in-depth analysis which may be required by the individual exporter.

THE ORGANIC PRODUCTS MARKET IN BRAZIL

Team Canada Inc • Équipe Canada inc

EXECUTIVE SUMMARY

As the world's tenth-largest economy, Brazil is the largest economic power in Latin America. Brazil is also Canada's largest trading partner in the region. Two-way trade in 2001 was estimated at $2.4 billion[1] with agri-food exports totalling $55 million.

The Brazilian organic food market is estimated to be worth approximately $450 million in 2001, with growth as high as 30% annually. The domestic demand for health foods and organic foods is growing in Brazil as a result of interest in healthier lifestyles and increased consumer buying power. Leading organic food products produced in Brazil include coffee, sugar, oranges and orange juice, and soybeans. Organic farming is growing rapidly in the south and southeast regions of the country, but it is growing from a very small base. Production is primarily grains and vegetables, with some work in meat and dairy sectors. Certified area has increased from 100,000 ha to 270,000 ha in 2001 over the last few years. There are over 7,000 certified organic farmers in Brazil.

As much as 80% of organic food products are purchased at supermarkets. Most retail outlets are looking for additional organic products for their shelves, particularly fruit and vegetables and processed products. Canadian firms interested in this market will find access difficult and may wish to focus on specialized niche areas such high-end, value-added food products. Imports of organic products are relatively limited, making this a new and potentially lucrative market, despite the challenges.

[1] All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on IDD Information Services, *Tradeline*, November 2001.

TABLE OF CONTENTS

EXECUTIVE SUMMARY 4

MARKET OVERVIEW 6
Key Factors Shaping Market Growth 7
Opportunities 8

COMPETITIVE ENVIRONMENT 8
Local Capabilities 8
International Competition 8
Canadian Position 8
Competitive Advantage Through Canadian Government Policies and Initiatives 9

PRIVATE-SECTOR CUSTOMERS 10

MARKET LOGISTICS 11
Channels of Distribution 11
Distributors and Wholesalers 11
Agents and Sales Representatives 12
Market-entry Considerations 12
Suggested Business Practices 12
Import Regulations 13
Local Standards, Certificates or Registrations 14
Export Credit Risks, Restrictions on Letters of Credit, Currency Controls 15

PROMOTIONAL EVENTS 16

KEY CONTACTS AND SUPPORT SERVICES 17

BIBLIOGRAPHY 21

OTHER REFERENCE MATERIAL 21
Useful Internet Sites 21

THE ORGANIC PRODUCTS MARKET IN BRAZIL

Team Canada Inc • Équipe Canada inc

MARKET OVERVIEW

Brazil is the largest economic power in Latin America and the tenth-largest economy in the world with a gross domestic product (GDP) of approximately $800 billion in 2001. The country has a population of approximately 172 million, making Brazil the most populous country in Latin America. Seventy-five percent of the population lives in urban areas, particularly in São Paulo, Rio de Janeiro, and Belo Horizonte. There are 15 cities throughout Brazil with a population of over one million.

There have been numerous and continual changes in Brazil's trade policies and programs that are resulting in a more open and competitive national economy. The effects of the economic liberalization program that started in mid-1994—the Plano Real (named after the Brazilian currency)—are still being felt. The Cardoso administration made economic stabilization and modernization its priorities in this plan, using both austerity and privatization programs as a driving force. After challenges in the late 1990s and a decision to float the currency in 1999, the economy began to improve in 2000 with an increased GDP of 4.5% and lowered inflation rates.

Brazil is Canada's largest trading partner in South America. Two-way trade in 2001 was estimated at $2.4 billion, a decrease from $150 million in 2000. Agri-food exports totalled $55 million in 2001. Canada's largest agricultural export to Brazil in 2001 was malt, representing 27.8% of total agri-food exports. Other key Canadian agri-food exports to Brazil were peas (18.2%), canary seed (17.1%), wheat (13.1%) and lentils (12.6%). The top five Canadian agricultural exports to Brazil represented 88.8% of total agri-food exports.

In recent years, Brazilians have attained higher purchasing power and a lower inflation rate. The stable economy, in addition to the fact that many women have entered the work force, has meant more disposable income for families; as a result, the way many Brazilians eat and live have changed. Dual-earner families have more income but less time to prepare meals. The domestic demand for health foods and organic foods is also growing in Brazil, as the country continues to be influenced by international trends. The United States, in particular, has a guiding effect on Brazilian consumer preferences. Demand for these products is increasing and there is evidence that Brazilian shoppers will pay a premium for them.

The Brazilian organic food market is estimated to be worth approximately $450 million in 2001, with growth as high as 30% annually as a result of a shift to healthier lifestyles. Leading organic food products produced in Brazil include coffee, sugar, oranges and orange juice, corn and soybeans. Most supermarket chains are looking for additional organic products for their shelves, particularly fruit and vegetables and processed food products.

Canadian firms will want to monitor signs of growth in this area as specialized niches, such as organic ingredients, become more mainstream. Organic farming is growing rapidly in the south and southeast regions of Brazil, but it is growing from a very small base. Production is primarily grains and vegetables, with some work in meat and dairy sectors. There are over 7,000 certified organic farmers in Brazil and the Biodynamic Institute of Rural Development (Instituto Biodinamico [IBD])[2] promotes organic farming. Whether domestic suppliers can accommodate the market remains to be seen. Imports of organic products remain limited.

Key Factors Shaping Market Growth

The inflation-fighting policies implemented by the Brazilian government have profoundly affected numerous sectors of the nation's economy, including food product processing. As is the case with most industries, overall economic growth is required to support and sustain growth. The stabilization achieved through 2000 and 2001 has seen growth in the agri-food industry, and increased opportunities for food importers.

Economic reform has also affected consumer behaviour in Brazil. The recent sharp drop in inflation has increased the buying power of lower-income Brazilians. The significance of this new reality should not be underestimated, since 52.5% of Brazilian households are classified as low-income or poor. Estimates suggest that 13 million consumers are now in a position to consume more, including value-added and high-end food products.

As well as economic conditions and other challenges facing Canadian exporters in foreign markets, Canadians seeking to develop a market in Brazil face additional hurdles as a result of recent trade disputes. There remains a negative image of Canada and Canadian products in Brazil and while the Canadian government and industry is working to promote and improve Canada's image, exporters may still face challenges when promoting individual products with both imports and consumers.

[2] For contact information regarding key organizations mentioned in this report, see **Key Contacts and Support Services**.

There is no international agreement between Canada and Brazil concerning the certification of organic products. Exporters will have to seek their own accreditation from either the IBD or the Association of Organic Agriculture (AAO) in Brazil. This may delay exports and require additional vigilance on the part of Canadian companies.

Opportunities

There are opportunities for Canadian companies to provide organic products to Brazilian consumers although entering the market will be challenging. There is particular demand for organic fruits and vegetables as well as organic processed food products, such as jams, fruit juices, pasta, tea, vegetable oil, cookies, ready-to-eat frozen products and wheat flour.

COMPETITIVE ENVIRONMENT

Local Capabilities

Brazilian organic produce is still limited to small farms. Larger players in the market focus on sugar, soybean and coffee production, and there are some large orange juice producers. Key export markets are the European Union (primarily Germany) and Japan. The Landless Peasant Movement is a strong supporter of organic farming methods, and as families are settled on unused or underused land, the movement teaches sustainable and organic farming methods.

The government has encouraged some organic farming through a support program announced in August 2001. The government announced $2 billion in support of family agricultural products, including initiatives to stimulate organic production and funding for female farmers.

International Competition

European and U.S. companies are highly active in the Brazilian food market, although there are few companies involved in the organic food market. Brazilians typically associate U.S. companies with fast-food or convenience food, while consumers have a more "high end" perception of European imports. As a result, organic products from Europe are currently more readily available.

Canadian Position

Canadian firms are not likely to be known in the Brazilian organic food sector, which means that relationship building will be lengthy process. Canadian companies will also be at a disadvantage when competing with Brazil's Mercosul trading partners and, in many instances, European countries that still exert influence over Brazilian tastes and

traditions. Canada generally has a competitive advantage over the United States with regard to price position. However, this is negated by the U.S. leadership role in many segments of food industry, as well as the increasing influence of U.S. business and culture on Brazil.

Additionally, recent negative media coverage about Canada with respect to the ban on Brazilian beef may have spawned some discontent among Brazilian businesses toward Canadians. This incident, coupled with the growing public awareness of the two-year-old Embraer-Bombardier dispute, has strained Canada-Brazil relations. Canadian firms are advised to seek assistance from experienced local professionals when developing their strategy to sell their products in Brazil.

Competitive Advantage Through Canadian Government Policies and Initiatives

The Canadian government at both the federal and provincial levels offer programs and services to promote Canadian agricultural products and services abroad. These agencies have organized and participated in trade missions and events to promote Canadian food products in the Brazilian market. They ensure a Canadian presence in numerous Brazilian and Latin American trade shows and offer support to Canadian food exhibitors attending these events.

Additionally, the Trade Commissioner Service of the Department of Foreign Affairs and International Trade provides a wealth of information in the form of reports and market insights. Trade Commissioners in Brazil are available to assist export-ready firms by providing advice, key business contacts and current market intelligence.

Agri-Food Trade Program

The Agri-Food Trade Program (AFTP) is a cost-shared contribution program designed to support Canadian agri-food industry activities in areas of market readiness, market access and market development with the ultimate objective to increase sales of agriculture, agri-food and beverage products in domestic and foreign markets. One of the elements of the AFTP program called Agri-Food Industry Market Strategies (AIMS) encourages related Canadian associations to develop and implement sectoral export market development strategies to improve their global competitiveness.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) gives Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. The CCC will also act as a prime contractor on behalf of Canadian

small and medium-sized enterprises, giving those businesses increased credibility and competitive advantage.

Export Development Canada

Export Development Canada (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, bank credits or bank guarantees. Approval for financing is considered on a case-by-case basis.

Program for Export Market Development

The Program for Export Market Development (PEMD) helps Canadian companies enter new markets by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. Eligible costs and activities include market visits, trade fair participation abroad, incoming buyers, product testing for market certification, legal fees for international marketing agreements, air transportation costs of offshore company trainees, product demonstration costs and other costs necessary to execute a market development plan. Activity costs are shared on a pre-approved, 50/50 basis.

The PEMD refundable contribution ranges from $5,000 to a maximum of $50,000. Preference is given to companies with fewer than 100 employees for a firm in the manufacturing sector and 50 in the service industry, or with annual sales between $250,000 and $10 million. Other components of the program include international bid preparation (Capital Project Bidding) and, for trade associations, developing international marketing activities for their membership. For additional information visit http://www.infoexport.gc.ca/pemd/menu-e.asp or call 1-888-811-1119.

WIN Exports

WIN Exports, a database of Canadian exporters and their capabilities, is used by trade commissioners around the world and by Team Canada Inc partners in Canada to match Canadian suppliers with foreign business leads, and to share information on trade events. To register your company in WIN Exports or for more information, visit http://www.infoexport.gc.ca/winexports/home_e.html or call 1-888-811-1119.

PRIVATE-SECTOR CUSTOMERS

Sales of organic foods were originally limited to natural food stores or health food stores because qualities were limited and awareness among consumers was low. As consumers become more concerned about a healthy lifestyle and interested in organic

food products, more mainstream supermarkets have added organic products to their shelves. Supermarkets now account for more than 80% of all organic food sales.

There are approximately 19,000 supermarkets in Brazil (up from 14 000 in 1990), with annual sales of $55 billion in 2001, accounting for 92% of total self-service sales. The top supermarket chains in Brazil (2000) are:

- Cia Brasileira de Distribuição
- Carrefour Com. Ind. Ltda
- Bom Preço S.A.
- Sonae Distribuição Brasil S.A.
- Casas Sendas S.A.
- Wal-Mart Brasil
- Sé S.A Comércio e Importação
- Cia Zaffari
- G. Barbosa & Cia. Ltda.
- Coop Cooperativa de Consumo

MARKET LOGISTICS

Channels of Distribution

The traditional distribution system of imported foods, whereby specialty importers, wholesalers, trading companies and brokers played a major role, is diminishing. Today, food manufacturers, supermarkets, and large food retailers are buying directly from foreign suppliers. Organic products in Brazil are typically 25-30% higher in price than conventionally produced products.

Distributors and Wholesalers

Wholesalers serve several important functions in Brazil for retailers, principally due to the country's large geographical area. Most food products in Brazil have traditionally passed through wholesalers, particularly in the case of dry goods sold to small independent stores. In addition, wholesalers perform several invaluable services, including stocking shelves and pricing items, extending credit, offering rebates, and frequent delivery of products. As well, most of the time they accept the return of unsold goods. The wholesale sector in Brazil has 40 years of history, and although today they are less important than in the past due to the retailers' efforts to eliminate middlemen, wholesalers still serve important delivery and financial (especially credit) functions. Some large wholesalers are also performing retail functions, although a significant 65% of the sector still performs the traditional wholesaler function of product delivery.

Specialty importers focus on a particular food category such as nuts, fruits, or pork. They are mainly located in the cities of São Paulo and Rio de Janeiro, and account for an estimated 40% of imported consumer-ready food products. The mark-up on these products varies between 5% and 12%. These importers do not handle large volumes of

foods. Typically, they serve as brokers, and products are sold before they make their orders. Specialty importers are recommended for Canadian exporters who are new to the market.

Agents and Sales Representatives

A good agent or sales representative can be an invaluable resource in the Brazilian food industry. Enlisting the services of an experienced and competent agent will help Canadian firms better understand the regulatory, marketing, promotional, and business intricacies of the industry. Agents can be the best advisors with regard to trends and potential opportunities. Additional information on qualified agents may be available from the Canadian Embassy or Consulates in Brazil.

Market-entry Considerations

Canadian firms interested in the Brazilian market for organic foods must be prepared to invest both time and resources to achieve success and are likely to find market entry challenging. Canadians face distinct disadvantages in the form of established local and foreign competition, language and cultural barriers, cost issues and perhaps most significantly, a general lack of awareness among Brazilians of Canadian companies and their capabilities. Overcoming these efforts requires a concerted effort on the part of Canadian firms. It is imperative that Canadian exporters make their presence known to potential customers in Brazil, through personal contact and attendance at trade shows and other industry events.

Canadian companies may wish to consider a regional approach to the market, as opposed to a national distribution strategy, because Brazil's size often necessitates that Canadian exporters hire several agents to ensure national distribution. Exporters are advised that the Brazilian consumer market decreases considerably outside major city centres.

Suggested Business Practices

When establishing contacts in Brazil, exporters are advised to arrange for an introduction by a respected third party, rather than attempting to make contact on their own. Canadian Trade Commissioners can assist in arranging this type of introduction.

The pace of negotiations is slower in Brazil and is likely to require more personal contact than Canadians may be accustomed to. Some Brazilian executives do not respond favourably to short visits made by foreign business representatives. This "in and out" approach is considered disrespectful. Also, attention to after-sales service is typically a concern to Brazilian buyers. Canadian firms must be prepared to adequately address these challenges.

While most Brazilian business people speak English, they often prefer to conduct business in Portuguese. Canadian firms are advised to prepare their promotional materials, literature and letters in Brazilian Portuguese. Business travellers require temporary visas to conduct any business in Brazil, whether it is to sign legal documents, engage in financial or commercial transactions, or conduct research.

Import Regulations

Brazil participates in Mercosul (Mercosur in Spanish), a Latin American trade agreement with Argentina, Chile, Paraguay and Uruguay. Mercosul provides for a common market and customs union among member states that allows free transit of goods and services, fixes a common external tariff, and provides for the adoption of a common trade policy. This preference to goods from member countries creates a trade barrier to Canadian firms. The Mercosul common external tariff was implemented on January 1, 1995 and ranges up to 23%, with some exemptions (recorded on each Mercosul member's national list).

Regulation and marketing of food products in Brazil is under federal jurisdiction. At present, two ministries, through their various branches, regulate and control the import of food products[3]:

- the Ministry of Agriculture and Food Supply oversees fresh products, primary manufactured goods, animal products, pet products, live animals, plants, and alcoholic and non-alcoholic beverages; and

- the Ministry of Health (Ministério de Saúde [MS]) oversees processed products and food supplements, except those under the authority of the Ministry of Agriculture.

For some goods, these agencies require that the importer and/or the products be registered with the proper authorities. Although it is the importer's responsibility to take the necessary steps to register, the exporter should be ready to provide samples, documents and any other information required. For a copy of the recent legislation in English or French, contact the Canadian Embassy in Brazil.

Documentation

The basic Brazilian documentation requirements include an import permit, a commercial invoice, a bill of lading and a health or phytosanitary certificate.

[3] A complete explanation of all food import regulations and standards can be found in the United States Department of Agriculture report, "Brazil: Food and Agricultural Import Regulations and Standards Country Report, 2001." GAIN Report #BR1615.

Import Permit: The import permit is the most important document required for exporting to Brazil. To acquire an import permit, an application must be made to the Foreign Trade Department of the Bank of Brazil (DECEX). A new automated system for obtaining import licences, SISCOMEX (Sistema Integrado de Comércio Exterior), is now in place. For information on how to apply on line, contact a Trade Commissioner at one of the Canadian consulates in Brazil. The issued permit will state that it is valid for 90 days (which is the maximum time for embarkation of goods or, in certain cases, for registering the import declaration).

Commercial Invoice: A commercial invoice should be prepared by the manufacturer or the seller in the country of origin and should provide the following information: full address of the shipper, seller, and the consignee; import permit number and other reference numbers; date of order; shipping date; delivery and payment terms; and a complete description of the merchandise and markings.

Bill of Lading: The bill of lading should be non-negotiable, numbered and dated. A copy should be attached to each commercial invoice. The bill must also display the import licence number and expiration date, as well as the freight charges in both numbers and words.

Health or Phytosanitary Certificates: For the import of agri-food products, Brazilian authorities require a health and sanitary product certificate issued by Agriculture and Agri-Food Canada and duly stamped by the Brazilian Consulate in Montreal or Toronto. It is important to note that health and phytosanitary certificates must be authenticated by a Brazilian consulate in Canada.

Special Documentation: Various special documents are required for the importation of specific products. Exporters are encouraged to consult with local agents to ensure that the documentary needs for their products are met.

All documents must accompany the product when it enters Customs and must be accurately completed to avoid long delays and/or fines. According to Brazil's Basic Import Regulations, the fines in Brazil can be very heavy. For example, importing without an import permit can result in fines ranging from 20% to 100% of the cost, insurance and freight (c.i.f.) value of the products.

Authentication of Documents: Documents requiring authentication, such as certificates of sale and letters authorizing a local agent or importer to act on the exporter's behalf, must first be notarized in Canada. The notarized documents can then be authenticated, free of charge, by sending them to DFAIT's Authentication and Service of Documents division (JLAC).

Local Standards, Certificates or Registrations

Phytosanitary and/or health and sanitary product certificates are required for food products entering the country. These documents must be notarized by a Brazilian Consulate in Canada and should accompany the certificate of origin. Food products require advance registration with the appropriate ministry: Health Ministry or Agriculture Ministry. These registrations are typically issued within two weeks.

The National Agency for Sanitary Surveillance (ANVS), created in January 1999, is the scientific regulatory agency responsible for the safety of all foods (except meat, poultry, dairy, fisheries, alcoholic beverages, feed, and veterinary products, which fall under the Ministry of Agriculture), and other consumer products. The ANVS reports to the Ministry of Health, and includes five departments: the Departments of Food and Toxicology (concerned with food production); and the Departments of Ports, Airports, and Borders (which cover food imports and exports). Imported food products must be registered with the ANVS before they enter the country.

The Brazilian Ministry of Health has established standards for light and diet foods. Light products must have at least a 25% reduction in calories from the original product, and diet products are limited to products for people with diabetes.

Labelling and Packaging

In Brazil, some labels must be pre-approved by the Ministry of Agriculture and/or the Ministry of Health. Some Brazilian firms specialize in providing technical assistance required to register with the ministries concerned. A listing may be obtained from any Canadian embassy or consulate in Brazil.

The following information is required on all consumer packaging in Portuguese:

- product name;
- country of origin;
- quality, purity or mixture;
- net volume and weight expressed in metric units or equivalent measure;
- food colouring and other additives;
- manufacturer's production and expiry date;
- ingredients;
- storage instructions (if necessary); and
- shelf life.

Export Credit Risks, Restrictions on Letters of Credit, Currency Controls

Payment can be made by traditional forms (e.g. letters of credit or bank transfers) with no restrictions. Advance payments for imports are limited to 20% of the total value; the balance is released after the arrival of the goods. Full advance payments are allowed only for imports up to $6,500 freight on board (f.o.b.). Preferred forms of payment are bank transfer, cash against documents, and letters of credit.

PROMOTIONAL EVENTS

Event/Description	Organizer
ABIA Food Service 2002 April 2-5, 2002 Expo Center North São Paulo, Brazil ABIA is the leading Brazilian foodservice industry event	AMM Feiras & Negócios Av. Nove de Julho, 5966 cj 31 01406-200 São Paulo, SP Brazil Tel.: (55-11) 3063-3205 Fax: (55-11) 3068-9472
SIAL Montreal April 2-4, 2003 Palais des Congres de Montreal Montreal, Quebec Incoming mission of key Brazilian buyers to provide Canadian exporters with an opportunity to showcase their products	SIAL Montreal 300 Leo-Pariseau, Suite 1100 Place du Parc PO Box 455 Montreal, QC H2W 2N9 Tel.: (514) 289-9669 Fax: (514) 849-3021 E-mail: info@sial-montréal.com Internet: http://www.sialmontreal.com/index.htm
IFOAM 2002 Organic World Congress, "Cultivating Communities" August 21-28, 2002 Victoria, British Columbia	IFOAM 2002 c/o Bldg. 20, 8801 E Saanich Rd Sidney, BC V8L 1H3 Tel.: (250) 655 5652 Fax: (250) 655 5657 E-mail: ifoam2002@cog.ca Internet: http://www.cog.ca/ifoam2002
ProNatura 2002 **International Phytotherapy, Organics and Natural Products Fair** October 9-13, 2002 Expo Center Norte São Paulo, Brazil	Francal Feiras e Empreendimentos Tel.: (55-11) 4191-8188 Fax: (55-11) 4191-0200 E-mail: feiras@francal.com.br Internet: http://www.francal.com.br
ABRAS 2002 September, 23-26, 2002 Rio de Janeiro, Brazil Food showcase targeting suppliers of products, services and equipments to supermarkets.	ABRAS (Brazilian Supermarkets Association) Av. Diógenes Ribeiro de Lima 2872 Cep: 05083-901 - Alto da Lapa São Paulo, SP Brazil Tel.: (55-11) 3838-4500 Fax: (55-11) 3837-9933 Contact: Claudio Guidini Internet: http://www.abrasnet.com.br

KEY CONTACTS AND SUPPORT SERVICES

Canadian Government Contacts

Canadian Embassy in Brazil
Ses-Av. das Nações, Lote 16
Brasilia, DF 70410, Brazil
Postal address:
Caixa Postal 00961
70359-970 Brasilia, DF Brazil
Tel.: (55-61) 321-2171
Fax: (55-61) 321-4529
Internet: http://www.dfait-maeci.gc.ca/brazil

Canadian Consulate General–São Paulo
CENU–Torre Norte
Av. das Nações Unidas, 12901 16th Floor
04578-000 São Paulo, SP Brazil
Tel.: (55-11) 5509-4321
Fax: (55-11) 5509-4260
Contact: Paulo Limas, Trade Officer
E-mail: infocentre-spalo@dfait-maeci.gc.ca
Internet: http://www.canada.org.br

Canadian Consulate General–Rio de Janeiro
Rua Lauro Muller 116, Rm. 2707
Torre Rio Sul Botafofo
22290-160 Rio de Janeiro, RJ Brazil
Tel.: (55-21) 542-7593
Fax: (55-21) 275-2195
E-mail: rio@dfait-maeci.gc.ca
Internet: http://www.dfait-maeci.gc.ca/brazil/rio

Agriculture and Agri-Food Canada
Sir John Carling Building
930 Carling Ave.
Ottawa, ON K1A 0C5
Tel.: (613) 759-7753
Fax: (613) 759-7505
Contact: Marcello DiFranco, Senior International Market Development Officer
E-mail: difrancom@em.agr.ca
Internet: http://www.agr.ca

Canadian Commercial Corporation
50 O'Connor St., 11th Floor
Ottawa, ON K1A 0S6
Tel.: 1-800-748-8191 or (613) 996-0034
Fax: (613) 995-2121
E-mail: info@ccc.ca
Internet: http://www.ccc.ca

Canadian Food Inspection Agency (CFIA)
59 Camelot Dr.
Nepean, ON K1A 0Y9
Tel.: (613) 225-2342
Fax: (613) 228-6653
E-mail: cfiamaster@em.agr.ca
Internet: http://www.cfia-acia.agr.ca

Department of Foreign Affairs and International Trade (DFAIT)
125 Sussex Dr.
Ottawa, ON K1A 0G2
Internet: http://www.dfait-maeci.gc.ca

Authentication and Service of Documents (JLAC)
Tel.: (613) 992-6602
Fax: (613) 992-2467

Market Support Division (TCM)
Contact: Raman Srivastava, Trade Commissioner
Tel.: (613) 9951773
Fax: (613) 944-0050

South America Division (LSR)
Contact: Pearl Williams, Trade Commissioner
Tel.: (613) 944-2419
Fax: (613) 943-8808

Export Development Canada (EDC)
151 O'Connor St.
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 598-6697
E-mail: export@edc4.edc.ca
Internet: http://www.edc-see.ca

Brazil:
Av. das Nacoes Unidas 12901
CENU Torre Norte, Andar 16
04578-000 São Paulo SP, Brazil
Tel.: (55-11) 5509-4321
Fax: (55-11) 5509-4260
E-mail: cescobar@edc-see.ca

Agriculture and Agri-Food Canada–Regional Contacts

Al McIsaac
St. John's, Nfld.
Tel.: (709) 772-0330
E-mail: mcisaaca@em.agr.ca

Margaret Bancroft
New Westminster, B.C.
Tel.: (604) 666-3054
E-mail: bancroftm@em.agr.ca

Jim Atcheson
Regina, Sask.
Tel.: (306) 780-5545
E-mail: atchesonj@em.agr.ca

Rollin Andrew
Charlottetown, P.E.I.
Tel.: (902) 566-7315
E-mail: andrewr@em.agr.ca

Janet Steele
Halifax, N.S.
Tel.: (902) 426-7171
E-mail: steelej@em.agr.ca

Bernard Mallet
Moncton, N.B.
Tel.: (506) 452-3706
E-mail: malletb@em.agr.ca

Fay Abizadeh
Winnipeg, Man.
Tel.: (204) 983-8622
E-mail: abizadehf@em.agr.ca

Sandra Gagné
Montreal, Que.
Tel.: (514) 283-3815 ext 523
E-mail: gagnes@em.agr.ca

Wayne Parlee
Guelph, Ont.
Tel.: (519) 837-5824
E-mail: parleew@em.agr.ca

Lorrie McFadden
Edmonton, Alta.
Tel.: (780) 495-2119
E-mail: mcfaddenl@em.agr.ca

Canadian Industry Associations

Brazil-Canada Chamber of Commerce
360 Bay St , Suite 300
Toronto, ON M5H 2V6
Tel.: (416) 364-3555
Fax: (416) 364-3453
E-mail: bccc@ccacanada.com
Internet: http://www.ccacanada.com/bccc

Canadian Organic Growers Inc.
PO Box 6408, Station J
Ottawa, ON K2A 3Y6
Tel.: (613) 231-9047
E-mail: info@cog.ca
Internet: http://www.cog.ca

Brazilian Government Contacts

Embassy of the Federative Republic of Brazil
450 Wilbrod St.
Ottawa, ON K1N 6M8
Tel.: (613) 237-1090
Fax: (613) 237-6144

Consulate General of Brazil in Toronto
77 Bloor St. W, Suite 1109
Toronto, ON M5S 1M2
Tel.: (416) 922-1058
Fax: (416) 922-2847
E-mail: trade@consbrastoronto.org
Internet: http://www.consbrastoronto.org

Consulate General of Brazil in Montreal
2000 Mansfield Ave., Suite 1700
Montreal, QC H3A 3A5
Tel.: (514) 499-0968
Fax: (514) 499-3963
E-mail: consbras@brasil.interax.net

Brazilian Economic Development Bank (Banco Nacional de Desenvolvimento Economico Social [BNDES])
Av. Republica do Chile, 100, sala 930
20001-900 Rio de Janeiro, RJ Brazil
Tel.: (55-21) 277-7748
Fax: (55-21) 240-3554
Internet: http://www.bndes.gov.br/eng.ish

Central Bank of Brazil (Banco Central do Brazil)
SBS Quadra 3 Bloco B, Ed. Sede
PO Box 08670
70074-900 Brasília, DF Brazil
Tel.: (55-61) 414-2401
Fax: (55-61) 321-9453
E-mail: cap.secre@bcb.gov.br
Internet: http://www.bcb.gov.br/defaulti.htm

Ministry of Agriculture and Food Supply
Esplanada dos Ministérios, Bloco D
70043-000 Brasília, DF Brazil
Tel.: (55-61) 218-2000
Fax: (55-61) 321-8360
E-mail: cenagri@agricultura.gov.br
Internet: http://www.agricultura.gov.br (Portugese)

Ministry of Health (Ministério da Saude)
Esplanada dos Ministérios, Bloco G
70058-900 Brasilia, DF Brazil
Tel.: (55-61) 226-0640
Fax: (55-61) 226-1493
Internet: http://www.saude.gov.br (Portugese)

Ministry of Finance (Ministerio da Fazenda)
Esplanada dos Ministerios
Bloco P, 40 Andar
70048-900 Brazil, DF Brazil
Tel.: (55-61) 412-3403
Fax: (55-61) 412-1537
Internet: http://www.fazenda.gov.br

Ministry of Foreign Relations (Ministério das Relações Exteriores [MRE])
Esplanada dos Ministerios
Palácio do Itamaraty
70170-900 Brasilia, DF Brazil
Tel.: (55-61) 211-6240
Fax: (55-61) 223-2392
Internet: http://www.mre.gov.br

Ministry of Development Industry and Commerce
Esplanada dos Ministérios, Bloco J
70053-900 Brasília, DF Brazil
Tel.: (55-61) 329-7000
E-mail: webmaster@mdic.gov.br
Internet: http://www.mdic.gov.br (Portugese)

Brazilian Industry Associations

Association of Organic Agriculture (Associação de Agricultura Orgânica [AAO])
Av. Francisco Matarazzo, 455
Prédio do Fazendeiro Sala 20
São Paulo, SP Brazil
Tel.: (55-11) 3673-8013
Internet: http://www.aao.org.br (Portugese)

Biodynamic Institute of Rural Development (Instituto Biodinamico [IBD])
Prudente de Moraes, 530
Caixa Postal 321
18603-970 Botucatu, SP Brazil
Tel.: (55-14) 6822-5066
Internet: http://www.ibd.com.br (Portugese)

Brazilian Agribusiness Association (Associação Brasileira de Agribusiness [ABAG])
Av. Vieira de Carvalhom, 172-1 Andar
01210-010 São Paulo, SP Brazil
Tel.: (55-11) 3337-1499
E-mail: abag@netpoint.com.br
Internet: http://www.abag.com.br (Portuguese)

Brazilian Association of Trading Companies (Associacao Brasileira das Empresas Comerciais Exportadoras ([ABECE])
Rua Da Quitanda, 191-6 Andar
20091-000 Rio de Janeiro, RJ Brazil
Tel.: (55-21) 253-1225
Fax: (55-21) 253-7278

Brazilian Food Processors Association (Associação Brasileira das Indústrias de Alimentação [ABIA])
Av. Bragadeiro Faria Lima, 1478-11 Andar
01451-913 São Paulo, SP Brazil
Tel : (55-11) 3816-5733
Fax: (55-11) 814-6688
E-mail: abia@uol.com.br
Internet: http://www.abia.org.br (Portuguese)

Brazilian Food Wholesalers and Distributors Association (ABAD)
Av. Nove de Julho, 3147-11 Andar
01407-000 São Paulo, SP Brazil
Tel.: (55-11) 3885-9616
Fax: (55-11) 3885-6840
E-mail: abad@abad.com.br
Internet: http://www.abad.com.br

Brazilian Foodservice Association (ABERC)
Rua Estela, 515-Bloco B-cj. 62
04011-904 São Paulo, SP Brazil
Tel.: (55-11) 5573-9835
Fax: (55-11) 5571-5542
E-mail: aberc@uol.com.br

Brazilian Foreign Trade Association (AEB)
Av. General Justo, 335-4 Andar
20021-130 Rio de Janeiro, RJ Brazil
Tel.: (55-21) 240-5048
Fax: (55-21) 240-5463

Brazilian Supermarket Association (Associação Brasileira de Supermercados)
Av. Diógenes Ribeiro de Lima 2872
Alto da Lapa
05083-901 São Paulo, SP Brazil
Tel.: (55-11) 3838-4500
Fax: (55-11) 3837-9933
E-mail: info@abrasnet.com.br

BIBLIOGRAPHY

Print

EFE News Services. "Agriculture Brazil to Invest in Family Agriculture," August 2001.

South American Business Information. "Brazil: Organic Food Business Grows 30% a Year," August 2000.

United States. United States Department of Agriculture. "Brazil: Organic Farming in Brazil, 1999," GAIN Report #9616, 1999. Available on-line from **http://www.fas.usda.gov**.

———."Brazil: Exporter Guide, 2001," GAIN Report #1031, 2001. Available on-line from **http://www.fas.usda.gov**.

———. "Brazil: Food and Agricultural Import Regulations and Standards, Country Report 2001," GAIN Report #BR1615, 2001. Available on-line from **http://www.fas.usda.gov**.

Electronic

Canada. Agriculture and Agri-Food Canada. "Agri-Food Export Business Guild, Brazil 2001," downloaded from **http://ats-sea.agr.ca/info/latin/e1709.htm** on November 20, 2001.

———. "Brazil: Agri-Food Export Market Assessment Report, Statistical Update, July 200," downloaded from **http://ats-sea.agr.ca/info/latin/e3197.htm** on November 20, 2001.

———. "Canada's International Business Strategy, 2001-2002," downloaded from **http://ats-sea.agr.ca/info/can/e3204.htm** on November 20, 2001.

OTHER REFERENCE MATERIAL

Useful Internet Sites

Agri-Food Trade Service: **http://ats.agr.ca**

Brazil Trade Net: **http://www.dpr.mre.gov.br**

Brazilian Central Bank: **http://www.bndes.gov.br**

InfoExport: **http://www.infoexport.gc.ca**

International Federation of Organic Agriculture Movements: **http://www.ifoam.org/**

Strategis: **http://strategis.gc.ca**

Tradeport: **http://www.tradeport.org**

U.S. Department of Agriculture: **http://www.fas.usda.gov**

READER EVALUATION

click here to complete online

Please help the Market Research Centre to produce market reports that meet your information needs by completing this evaluation form and returning it by fax to (613) 943-1103. Thank you for your valuable input.

1. How did you obtain a copy of this market report?
   - ☐ InfoCentre FaxLink system
   - ☐ InfoCentre help line
   - ☐ Local government office
   - ☐ Government Internet site
   - ☐ Other: _____

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	☐	☐	☐	☐	☐
Complete	☐	☐	☐	☐	☐
Well organized	☐	☐	☐	☐	☐
Well written	☐	☐	☐	☐	☐
Ideal length	☐	☐	☐	☐	☐

3. In what form do you prefer to obtain these reports?
   - ☐ Print
   - ☐ Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.
   - ☐ Seek an agent/distributor
   - ☐ Visit the market
   - ☐ Do more research
   - ☐ Other: _____
   - ☐ Contact Canadian trade office abroad
   - ☐ Participate in a trade show abroad
   - ☐ Nothing

5. What other market reports would be of benefit to your organization? Please identify specific products and countries. _____

6. Which of the following categories best describes your organization? Check one only.
   - ☐ Processor/manufacturer
   - ☐ Trading house
   - ☐ Export service provider
   - ☐ Industry/trade association
   - ☐ Government
   - ☐ Student/academia
   - ☐ Consultant
   - ☐ Other: _____

7. What were your organization's total sales last year, in Canadian dollars?
   - ☐ Less than $10 million
   - ☐ More than $50 million
   - ☐ $10 million to $50 million
   - ☐ Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____